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ABSTRACT

In this paper the role of qualitative research in special education is examined. The implications of an earlier naturalistic study are cited, an important one being the tendency in the literature to oversimplify the naturalistic paradigm; and the case is made that implementing such a paradigm is a "labor intensive" approach to research in which no short cuts are possible. The experience of the creators of the earlier study shows the importance of an "emergent design principle" by which the research expands to include a larger field of interest as needed. Stringent requirements for creating an audit trail and for translating field notes immediately are described. It is concluded that the naturalistic inquiry method may be best suited for situations in which a person wants to understand what is occurring in complex human systems and is willing to expend great time and effort. (CL)

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QUALITATIVE RESEARCH

ED MEYEN

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AS HAS BEEN POINTED OUT, OUR INTENT TODAY IS NOT TO DEBATE THE MERITS OF QUALITATIVE VERSUS QUANTITATIVE METHODOLOGY. FROM MY PERSPECTIVE THAT WOULD BE COUNTER-PRODUCTIVE AND APPROXIMATE THE COMPARING OF APPLES TO ORANGES. BOTH REPRESENT CLASSES OF RESEARCH METHODOLOGIES, BUT, IN MY OPINION, THAT IS WHERE THE COMPARISON ENDS. ON ONE ~~END~~ hand WE HAVE A 100-YEAR OLD ADOLESCENT AND ON THE OTHER WE HAVE A YOUNGSTER, WHO AT TIMES SHOWS SIGNS OF GREAT PROMISE.

QUANTITATIVE RESEARCH METHODS HAVE BEEN USED IN THE SOCIAL AND BEHAVIORAL SCIENCES BY THE PAST SEVERAL GENERATIONS OF RESEARCHERS. QUALITATIVE RESEARCH HAS ALSO BEEN AROUND FOR SOME TIME, BUT, HAS NOT BEEN THE FOCUS OF RESEARCHERS IN OUR FIELD, AND, THUS, HAS NOT HAD THE BENEFIT OF BEING EXTENSIVELY EMPLOYED, EVALUATED, AND REFINED. MORE IMPORTANTLY, FEW RESEARCHERS IN SPECIAL EDUCATION HAVE TAKEN ADVANTAGE OF OPPORTUNITIES TO DEVELOP SKILLS IN QUALITATIVE RESEARCH METHODOLOGIES. BY

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COMPARISON TO QUANTITATIVE RESEARCH QUALITATIVE RESEARCH LACKS MATURITY. GIVEN THE PROPER NOURISHMENT QUALITATIVE RESEARCH MAY EVOLVE AS A RESEARCH APPROACH THAT IS FAR MORE APPROPRIATE FOR UNDERSTANDING MAJOR PROBLEMS INHIBITING OUR EFFECTIVENESS IN MEETING THE NEEDS OF INDIVIDUALS WITH DISABILITIES ~~IX~~ THAN DO CURRENT QUANTITATIVE METHODS.

FOR PURPOSES OF CREATING A CONTEXT FOR OUR LATER DISCUSSIONS, ALLOW ME TO SHARE SOME OBSERVATIONS OF WHAT OCCURRED IN A STUDY THAT EMPLOYED THE NATURALISTIC PARADIGM. IN 1981, NIE FUNDED A PROJECT TO STUDY RURAL DISTRICT COLLABORATION IN IMPLEMENTING P. L. 94-142. THE TEAM WAS COMPRISED OF TOM SKRTIC AND EARLE KNOWLTON, UNIVERSITY OF KANSAS, AND EGON GUBA FROM THE UNIVERSITY OF INDIANA. GUBA SPENT THE SECOND YEAR OF THE PROJECT IN RESIDENCE AT THE UNIVERSITY OF KANSAS. THE STUDY INCLUDED FIVE SITES WITH EACH SITE BEING LOCATED IN A DIFFERENT GEOGRAPHIC AREA OF THE COUNTRY.

SO THAT YOU CAN JUDGE MY QUALIFICATIONS AS AN OBSERVER, I SHOULD MENTION THAT TWO OF THE RESEARCHERS WERE COLLEAGUES WHOM I

KNEW VERY WELL AND WITH WHOM I HAD INTERACTED WITH OVER SEVERAL YEARS. I KNEW GUBA LESS WELL PERSONALLY, BUT WAS FAMILIAR WITH HIS WORK WITH YVONNA LINCOLN OF OUR FACULTY, WHO I KNEW QUITE WELL. I CONTRIBUTED TO THE DEVELOPMENT OF THE INITIAL PROPOSAL AND PARTICIPATED IN THE EARLY TRAINING SESSIONS ON NATURALISTIC INQUIRY METHODS CONDUCTED FOR THE PROJECT STAFF. I ALSO PARTICIPATED IN THE FIRST SITE VISIT. THAT WAS THE EXTENT OF MY DIRECT INVOLVEMENT. HOWEVER, THROUGHOUT THE PROJECT I INTERACTED WITH MEMBERS OF THE TEAM ON AN INFORMAL BASIS. THIS WAS PARTICULARLY TRUE IN REFERENCE TO SKRTIC AND KNOWLTON. ACCESS TO A NUMBER OF THEIR PAPERS AND RESEARCH NOTES WAS MADE AVAILABLE TO ME. THEREFORE, FOR THE MOST PART I WAS A PARTICIPANT/OBSERVER.

WHILE I DID NOT PURSUE AN ACTIVE ROLE IN THE RESEARCH. I HAD THE UNIQUE ADVANTAGE OF OBSERVING THE OPERATIONALIZING OF A MAJOR STUDY THAT EMPLOYED THE NATURALISTIC PARADIGM. A STUDY THAT INVOLVED ESTABLISHED THEORISTS (GUBA AND LINCOLN) AND RESEARCHERS WHO, WHILE LESS SOPHISTICATED IN THE NATURALISTIC METHOD AT THE BEGINNING OF THE PROJECT, BROUGHT TO THE PROJECT A KNOWLEDGE OF THE NATURAL SETTINGS AND THE SPECIAL EDUCATION

CONTEXT. MORE IMPORTANTLY, SKRTIC AND KOWLTON WERE UNBELIEVABLY COMMITTED TO TPANSLATING THE NATURALISTIC PARADIGM THEORY INTO APPLIED RESEARCH PRACTICES SO AS TO TEST THE METHODOLOGY AS WELL AS TO STUDY THE COLLABORATIVE RELATIONSHIPS AMONG DISTRICTS IN RURAL AREAS.

OBSERVATIONS

1. THE NATURALISTIC PARADIGM ESPOUSED BY GUBA AND LINCOLN, WHEN APPLIED, GOES BEYOND THE UTILIZATION OF QUALITATIVE PROCEDURES. SKRTIC AND KNOWLTON VERY EARLY IN THE PROJECT WERE CHALLENGED TO CHANGE THEIR WORLD VIEW OF INQUIRY. WHILE THEIR PREFERENCE FOR A RESEARCH METHODOLOGY SHIFTED TO QUALITATIVE METHODS, THE MOST SIGNIFICANT CHANGE WAS IN THEIR PHILOSOPHICAL PERCEPTION OF WHAT IS MEANINGFUL IN UNDERSTANDING EVENTS IN THE LARGER CONTEXT OF THE NATURAL SETTING. THE DATA GATHERING PROCEDURES ~~WAS~~ were ONLY ONE ASPECT OF HOW THEY

PERCEIVED THE NATURALISTIC PARADIGM.

2. IT WAS THIS PHILOSOPHICAL TRANSFORMATION THAT PROVIDED THE MOTIVATION AND COMMITMENT TO FULLY EXPLOIT THE AXIOMS OF NATURALISTIC INQUIRY AS POSTULATED BY GUBA AND LINCOLN. IT IS MY DISTINCT IMPRESSION THAT ANYTHING LESS THAN THIS COMMITMENT WOULD HAVE RESULTED IN A PEDESTRIAN APPROACH TO THE STUDY. IT WOULD NOT HAVE CONTRIBUTED TO OPERATIONALIZING THE NATURALISTIC INQUIRY METHODOLOGY. THIS LEAVES ME TO BELIEVE THAT THERE IS GREAT DANGER IN ENCOURAGING PEOPLE TO USE QUALITATIVE MEASURES UNLESS THEY HAVE A BROADER UNDERSTANDING OF HOW DATA DERIVED FROM SUCH MEASURES FIT INTO UNDERSTANDING WHAT IS BEING STUDIED.

3. GIVEN WHAT I OBSERVED OF THEIR BEHAVIOR AS RESEARCHERS, AND WHAT I HAVE BEEN READING REGARDING THE APPLICATION OF QUALITATIVE RESEARCH METHODS TO SPECIAL EDUCATION, I AM BECOMING CONVINCED THAT THERE IS A TENDENCY IN THE SPECIAL EDUCATION LITERATURE TO OVER-SIMPLIFY THE

NATURALISTIC PARADIGM AND TO ASSUME THAT QUALITATIVE METHODS AND THE NATURALISTIC PARADIGMS ARE SYNONYMOUS. THIS OBSERVATION LEADS ME TO BE CONCERNED THAT RESEARCHERS MIGHT OPT FOR QUALITATIVE METHODS ON THE ASSUMPTION THAT THE VARIOUS QUALITATIVE METHODS ARE EQUIVALENT TO THE MANY QUANTITATIVE STATISTICAL PROCEDURES WHERE YOU SELECT ONE OF SEVERAL STATISTICAL ANALYSES FOR PURPOSES OF DATA ANALYSIS

IN QUANTIFIABLE STATISTICAL ANALYSES THE RULES AND PROCEDURES ARE PRECISE. IN OTHER WORDS, IF YOU UNDERSTAND THE ASSUMPTIONS UNDERLYING YOUR RESEARCH DESIGN, AND YOU ARE FAMILIAR WITH THE ASSUMPTIONS THAT PARTICULAR STATISTICAL TECHNIQUES MUST MEET, THEN YOU ARE ABLE TO MAKE A DECISION ON THE MOST POWERFUL AND APPROPRIATE STATISTICAL ANALYSIS PROCEDURE. GIVEN THAT YOU ACCURATELY APPLY THE PROCEDURE, YOU HAVE THE PROTECTION OF THE WELL-TESTED STATISTICAL FORMULA OR PROCEDURE IN YOUR FAVOR. YOU ARE ONLY OPEN TO CRITICISM AS TO WHETHER OR NOT THE STATISTICAL ANALYSIS YOU

SELECTED WAS THE MOST APPROPPIATE ONE. WHEREAS IN QUALITATIVE METHODS YOU DO NOT HAVE AN EQUIVALENT CHOICE. THE SUBJECTIVE DIMENSION OF NATURALISTIC INQUIRY REQUIRES THAT YOU RETAIN RESPONSIBILITY THROUGHOUT THE PROCESS. YOU BECOME THE HUMAN INSTRUMENT. BOTH VALIDITY AND RELIABILITY (CREDIBILITY AND DEPENDABILITY, RESPECTIVELY, IN THE LANGUAGE OF NATURALISTIC INQUIRY -- PARALLEL BUT NOT SYNONYMOUS IDEAS) ARE BASED ON YOUR PERFORMANCE AS THE RESEARCHER.

4. IMPLEMENTING THE NATURALISTIC PARADIGM IS A LABOR INTENSIVE APPROACH TO RESEARCH. THIS IS TRUE IN ALL DIMENSIONS OF THE RESEARCH ACTIVITY, I.E., DATA COLLECTION, DATA REDUCTION, DATA ANALYSIS, INTERPRETATION, AND REPORTING. THERE ARE NO SHORTCUTS. I CAN RECALL SEEING TOM AND EARLE SPENDING HOURS UNITIZING THEIR FIELD NOTES AND DOING MEMBER CHECKS. YOU PERSONALLY HANDLE AND CONSIDER EACH PIECE OF DATA. YOU CANNOT CONCEDE THE PROCESS TO A RESEARCH ASSISTANT AS YOU MIGHT DO IN ANALYZING QUANTITATIVE DATA. IT WAS CLEAR

FROM OBSERVING THEM THAT THEY VIEWED THEMSELVES AS HUMAN INSTRUMENTS.

5. THE PREDETERMINED FOCUS OF THEIR STUDY WAS ON COLLABORATION AMONG RURAL DISTRICTS IN IMPLEMENTING P.L. 94-142. HOWEVER, AS THE STUDY UNFOLDED AND THEY LEARNED MORE ABOUT THE DYNAMICS OF PROGRAMMING FOR HANDICAPPED STUDENTS IN RURAL AREAS, THEY, IN TURN, EXPANDED THEIR RANGE OF CONCERNS. THERE WAS NO ATTEMPT TO DISCOUNT AND/OR IGNORE AN EVENT MERELY BECAUSE IT WAS NOT PART OF THEIR ORIGINAL THINKING WHEN THEY PLANNED THE STUDY. THE EMERGENT DESIGN PRINCIPLE POSTULATED BY GUBA TRULY OPERATED IN THIS STUDY.

WHEN YOU TALK TO SKRTIC ABOUT WHAT HE LEARNED FROM THE STUDY, HE DOESN'T BEGIN WITH A DISCUSSION ON COLLABORATIVE ARRANGEMENTS, INSTEAD HE TALKS ABOUT SCHOOL ORGANIZATION AND THE LARGER CONCERNS RELATIVE TO WHAT HE HAS LEARNED ABOUT HOW SCHOOLS STRUCTURE THEMSELVES FOR THE TASK OF EDUCATING CHILDREN. THIS LEADS ME TO BELIEVE

THAT IF YOU APPLY NATURALISTIC METHODOLOGY TO A PROBLEM IN A COMPELEX SETTING LIKE THE SCHOOLS THAT IT WOULD BE GROSSLY INEFFICIENT IF NOT INAPPROPRIATE TO LIMIT YOUP INVESTIGATION TO ONE CAREFULLY DEFINED AREA. IT IS ESSENTIAL TO ALLOW YOUR DESIGN TO EMERGE AND TO BE RESPONSIVE TO WHAT YOU LEARN. TO DO THIS MEANS THAT YOU BECOME INVOLVED IN STUDYING THE BROADER CONTEXT OF WHAT SURROUNDS THE PREDETERMINED FOCUS OF YOUR INVESTIGATION.

6. THROUGHOUT THE STUDY THEY WERE CAREFUL TO CREATE AN AUDIT TRAIL. IN OTHER WORDS, THEY WERE CONSCIOUS OF THE REQUIREMENT THAT THEIR RESULTS SHOULD BE ABLE TO STAND THE TEST OF A THIRD-PARTY AUDIT. (THIS IS RARELY DONE IN QUANTITATIVE RESEARCH). IT WAS APPARENT THAT THERE ARE NO ACCEPTABLE SHORTCUTS. THE AUDIT WAS NOT MERELY A REVIEW OF THEIR FIELD NOTES. THE AUDITOR (IN THIS CASE DR. VALERIE JANESICK OF SUNY-ALBANY) WAS CONCERNED WITH TRACKING THE EVIDENCE THAT SUPPORTED THEIR INFERENCES AND CHARACTERIZATIONS IN THEIR CASE STUDIES. THIS MEANT BEGINNING WITH THEIR UNITIZED OBSERVATIONS AND RELATING

THEM TO HE VARICUS STEPS INCLUDING MEMBER CHECKS AND TRIANGULATION. THE AUDITOR MUST BE ABLE TO RECONSTRUCT THE LOGIC REPORTED IN YOUR FINDINGS. CREATING AN AUDIT TRAIL IS FAR MOR DEMANDING ON THE RESEARCHER THAN ARE ANALOGOUS SITUATIONS IN QUANTITATIVE METHODS.

7. THERE WAS NO LULL IN THE DEMANDS ON THEIR TIME DURING THE STUDY. IN CONTRAST TO MOST QUANTITATIVE STUDIES WHERE THERE IS NO REQUIREMENT THAT YOU IMMEDIATELY ANALYZE, YOUR DATA, I.E., ONCE IT IS RECORDED IT DOESN'T CHANGE. IN QUANTITATIVE RESEARCH YOU CAN RECORD IT STORE IT, AND ANALYZE IT LATER IF YOU WISH. IN EMPLOYING THE NATURALISTIC PARADIGM YOU MUST TRANSLATE YOUR FIELD NOTES IMMEDIATELY OR RISK MISTAKES IN THE INTERPRETATION OF DATA OR EVEN THE LOSS OF DATA. YOU ARE THE INSTRUMENT AND YOUR NOTES BY THEMSELVES LOSE MEANING IF THEY ARE TRANSLATED BY SOMEONE ELSE OR IF YOU DELAY TO THE POINT THAT YOUR MEMORY BECOMES FAULTY. THEY WERE CONSTANTLY ENGULFED IN THEIR WORK ON THIS STUDY.

MY CONCLUDING OBSERVATION IS THAT IF YOU APPLY THE NATURALISTIC PARADIGM AS THEORIZED BY GUBA AND LINCOLN, YOU MUST BE PREPARED TO MAKE A MAJOR INVESTMENT OF EFFORT AND TIME. WHEN I CONSIDER THIS ALONG WITH THE EMERGING DESIGN PHENOMENON WHICH DOES OCCUR, I FIND MYSELF DEVELOPING THE POINT OF VIEW THAT THE SYNERGISM OF THE NATURALISTIC INQUIRY METHOD IS SUCH THAT IT IS MOST APPROPRIATELY APPLIED IN THOSE SITUATIONS IN WHICH A PERSON SERIOUSLY WANTS TO UNDERSTAND WHAT IS OCCURING IN COMPLEX HUMAN SYSTEMS (AND HOW WHAT IS OCCURRING IS SEEN DIFFERENTLY BY EVERYONE) AND IS WILLING TO MAKE THE STUDY THEIR MAJOR WORK FOR SEVERAL YEARS OR EVEN THEIR LIFE'S WORK.

AS I HAVE TALKED WITH SKRTIC OVER THE DURATION OF THE PROJECT AND HAVE OBSERVED HIS PARTICIPATION IN THE SCHOOL OF EDUCATION AND THE UNIVERSITY SINCE THEN, IT IS EVIDENT THAT THERE IS NO "NATURAL" CONCLUSION TO A NATURALISTIC STUDY. YES, YOU CAN BRING CLOSURE, BUT AT THE SAME TIME THE PROCESS OF THE RESEARCH ALLOWS YOU, IF NOT ENCOURAGES

YOU, TO CONTINUE BROADENING YOUR STUDY OF THE LARGER CONTEXT WHICH ENCOMPASSES THE PROBLEM YOU INITIALLY BEGAN TO STUDY. THE NATURAL SETTINGS OF ANY SIGNIFICANT RESEARCH PROBLEM DOES NOT APPEAR TO HAVE FINITE BOUNDARIES AND TENDS TO GROW AS YOU BEGIN TO UNDERSTAND IT. IN OTHER WORDS, YOU, AS THE HUMAN INSTRUMENT, SEEM TO EXPAND THE BOUNDARIES OF THE SETTING AS YOU LEARN.

FOR THE INTELLECTUALLY CURIOUS IT IS A SEDUCTIVE METHOD.